**Los Angeles County Community and Senior Services**

**Social Assistance Management System (SAMS)**

**Software Help Sheet 17:**

**SAMS Assessment –**

**New, Edit and Reassessments**

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|---|---|
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**Background**

The California Department of Aging (CDA) requires assessing Area Agency on Aging (AAA) consumers (with exception to Title III E – Only Care Receivers are to be assessed). Los Angeles County AAA created a Universal Intake Form (UIF) that manually captures reporting requirements of AAA programs.  The assessment screen in SAMS can be accessed through the SAMS application by following the steps below.

**Part One: Accessing the SAMS Assessment**

> Section one shows the procedures for accessing the Assessment in SAMS. Upon completing Part One, the user must decide on completing Part Two (Creating a New Assessment), Part Three Edit Assessments (used to update information only) or Part Four (Creating a Reassessment).

1. To access the SAMS Assessment screen, select **Consumers** from the SAMS Main Menu**.**
2. **Double click** on your consumer to open the record.  (Use your standard procedure for searching and finding the correct consumer.)
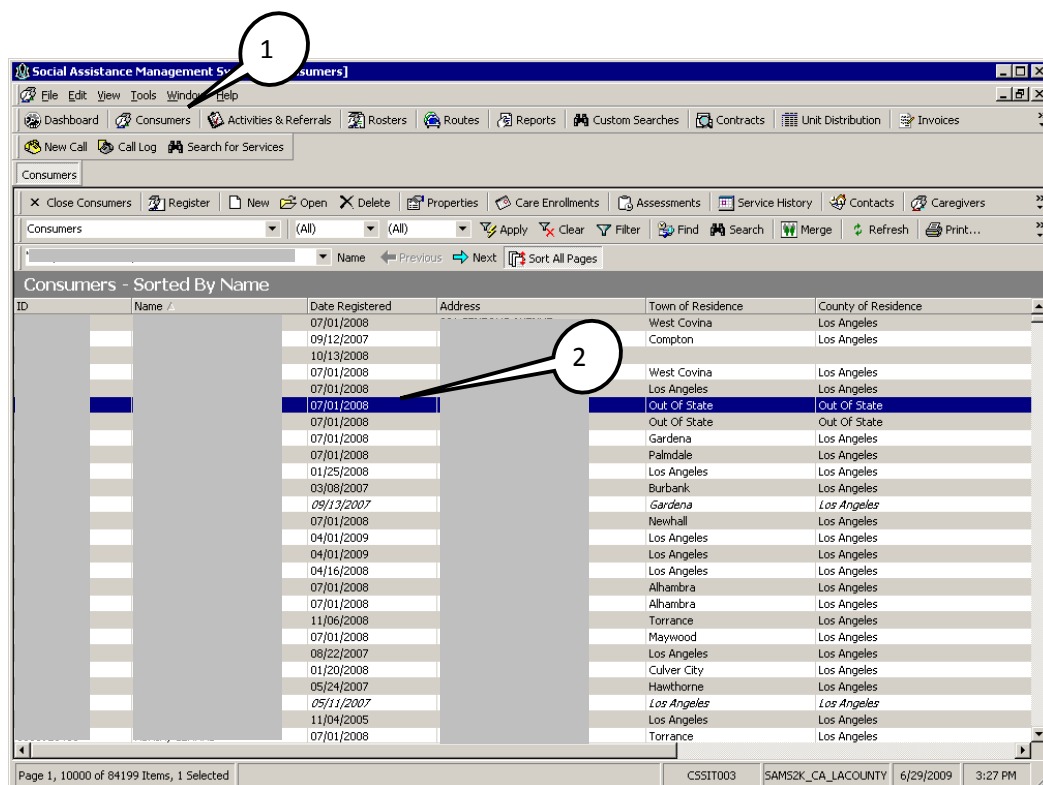
3. Once you are in the consumer summary page, select **Assessments** from the Consumer summary sub-menu, located on the left-hand side of the screen.



## Part Two: Creating a New Assessment

Creating a new assessment is necessary for consumers who do not have a prior assessment entered into the SAMS system. When creating an assessment, ensure that the correct assessment is selected. **With exception to Title III E – Only Care Receivers are to be assessed.** If an assessment has already been completed, then skip to Part Three to edit or Part Four to create a reassessment. To access the Assessment form, users must open it through the application using the following steps:

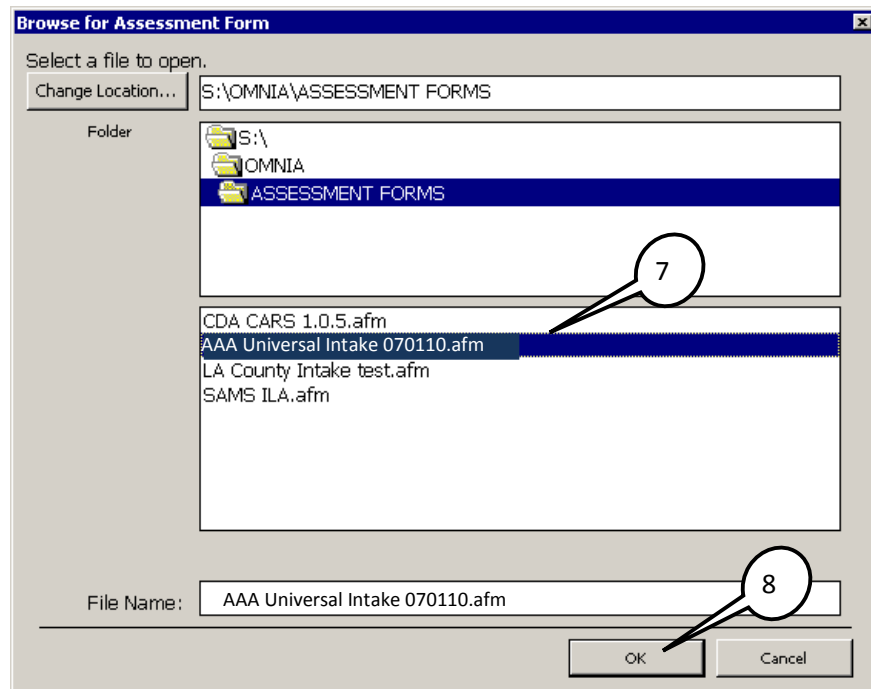4. Select **New Assessment** from the Assessment menu options for the consumer.
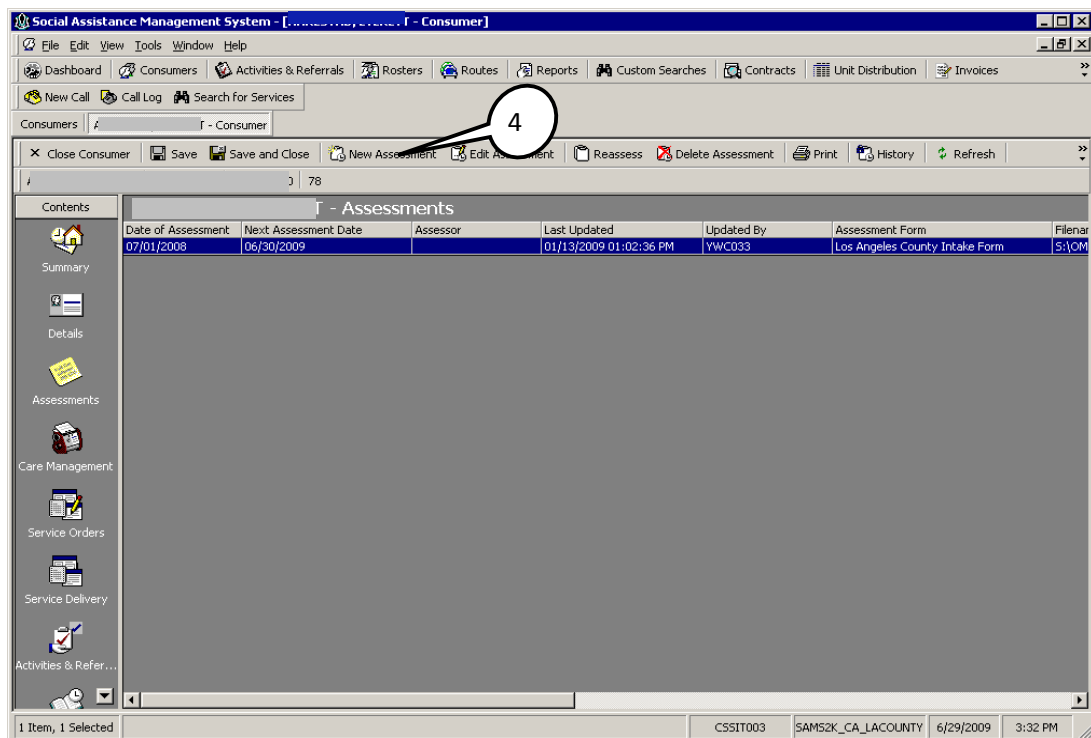
5. When the **New Assessment** window appears, click on the dropdown button under **Filename**.

6. Click on the "**AAA Universal Intake 070110.afm**" form. If the form is not listed, then click on **Browse** and complete steps 7 and 8.



Note: **DO NOT add a Password to the Assessment Form**

7. When the **Browse for Assessment Form** window appears, click on the assessment labeled "**AAA Universal Intake 070110.afm**".  (**See Addendum on page 9 if form is still not present**)
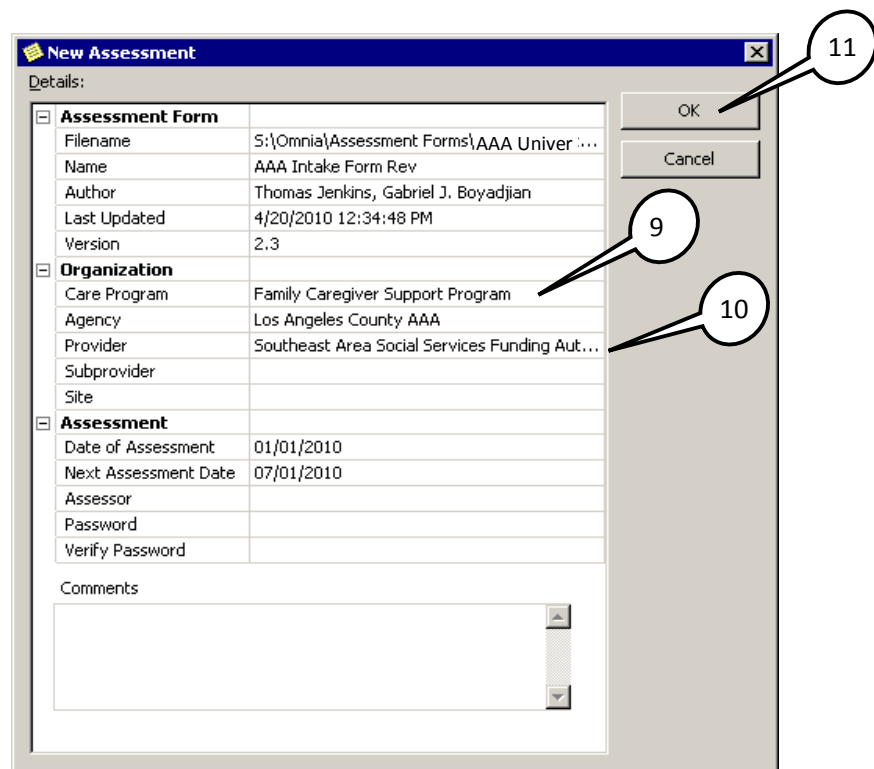
8. Then click on the **OK** button



9. When the **New Assessment** window re-appears you will notice that **most** fields are filled in, select the appropriate **Care Program.**
10. Select the correct **Provider**.
11. Click on the **OK** button to start filling in the necessary fields within the assessment.
    Note: Please do not use the password feature.

12. Complete your Assessment and ensure that each of the questions in the screening information, Nutrition Risk, ADL, and IADL questions are completed on the assessment form.  Once all the information is completed, click on the **Save and Close** button.  Once saved, the Assessment will be listed under the Consumer's Assessments (see step #4) and can be accessed/edited by double clicking on it from that screen.



## Part Three: Editing an Assessment

Use this feature to correct any information that has been entered incorrectly. This feature does not alter the Date of Assessment or the Next Assessment Date.

13. To edit an existing assessment, click on the **Edit button** and make updates as necessary.

**Note that editing the assessment dates is NOT equivalent to creating a new assessment or creating a reassessment. Unless you are correcting information, <u>DO NOT use this feature for a reassessment.</u>**

## Part Four: Creating a Reassessment

The reassessment feature allows providers to quickly transfer all existing answers and data from a previously entered assessment onto a new one. Once a new assessment has been created using the reassessment feature, providers can make changes on the new assessment by editing the necessary fields.

**CDA requires that a reassessment be completed for clients that receive ongoing AAA services. The following table provides you with the requirements for the frequency of the reassessments:**

| Program | Reassessment Frequency |
|---|---|
| **Family Caregiver Support Program (FCSP) – Title III E** | Annually (grandchildren excluded) |
| **Supportive Service Program (SSP) – Title III B** | Every 6-months (Semi-annually) |
| **Nutrition Programs (C1/C2)** | Annually |
| **Linkages** | Every 6-months (Semi-annually) |

14. Ensure that the correct assessment is highlighted.
15. Select **Reassess**\* from the Assessment menu options for the consumer.
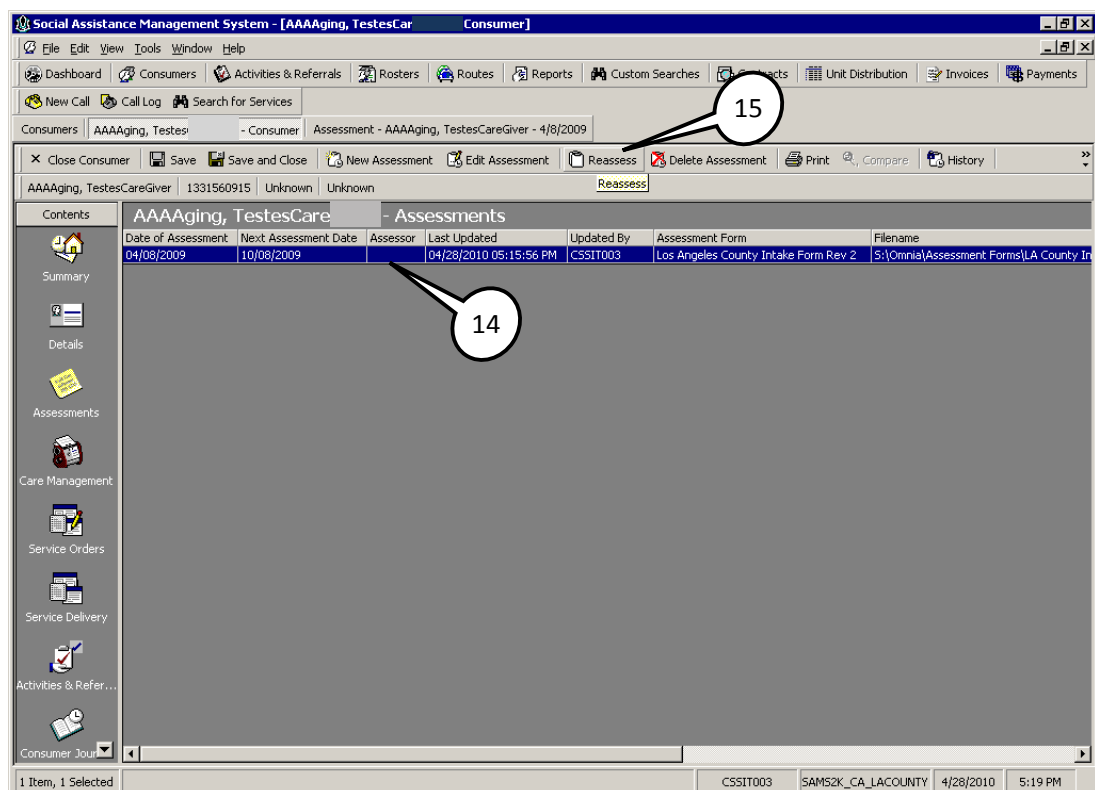


**NOTE  -  using the Reassess button allows for the previous responses from the selected assessment to carry over onto the current working assessment.**

16. When the Reassessment window appears, click on the dropdown button under **Filename** and **click** on the "**AAA Universal Intake 070110.afm**" form (see Steps 6, 7 and 8 for Browse option).
17. When the **Reassessment** window re-appears, ensure that the correct **Care Program** and **Provider** are showing.
18. Select the appropriate **Date of Assessment** and **Next Assessment Date**.
19. **Click** on the **Save & Open** button (ensure that no password is being used).



20. Complete the new Assessment by updating all relevant fields and then click on the **Save and Close** button. Make sure that all the screening information, Nutrition Risk, ADL, and IADL questions are answered on the assessment. Once saved, the Assessment will be listed under the Consumer's Assessments (see Step #4) and can be accessed/edited by double clicking on it from that screen.
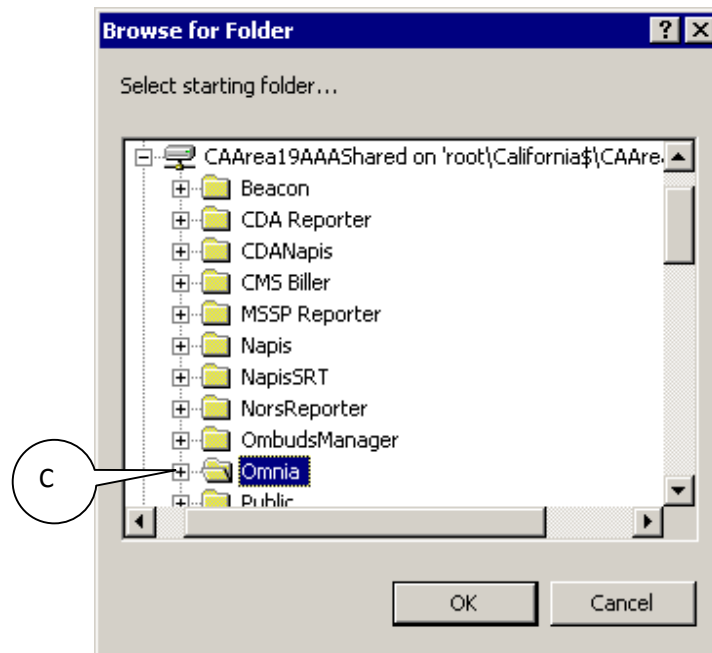
# Addendum

A) If after clicking on the [**Browes**…] you do not see "AAA Universal Intake 070110.afm", then **Click** on the **Change Location** button.
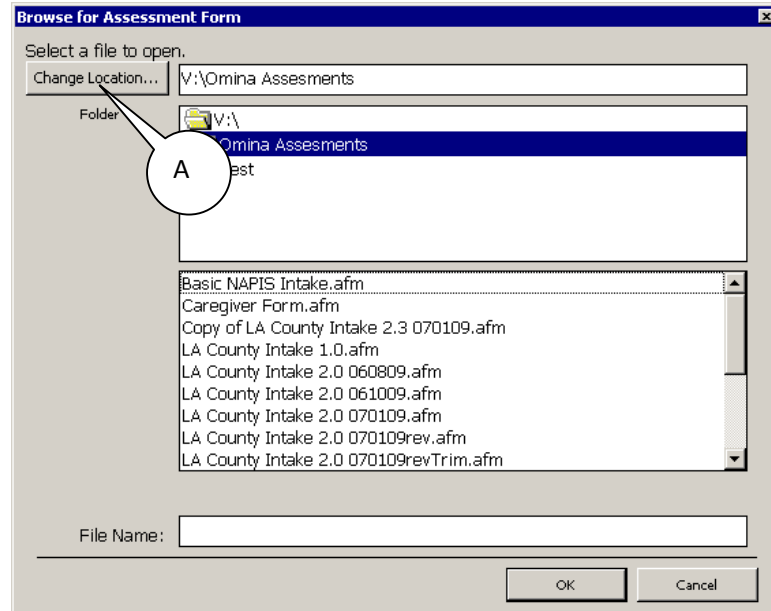


B) **Scroll** up or down until you see the blue highlighted line displayed below and **Click** on the **+** symbol located to the left of the blue highlighted line.
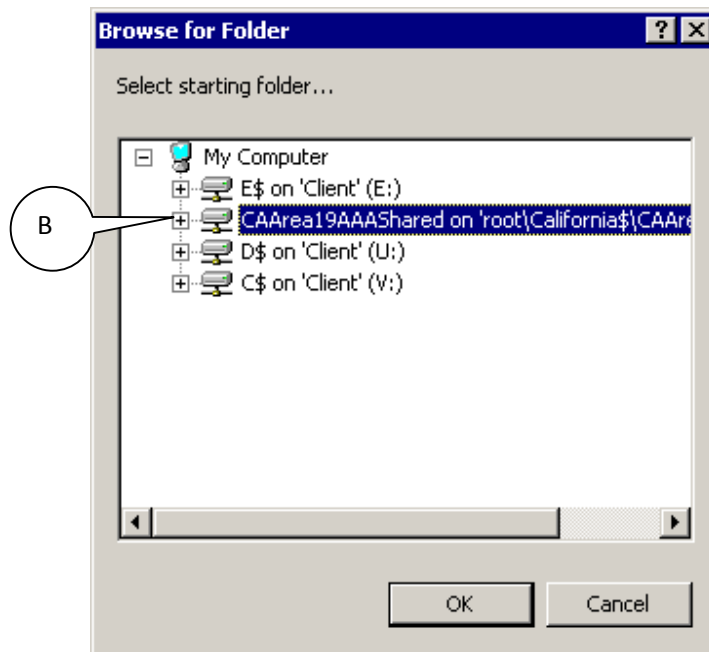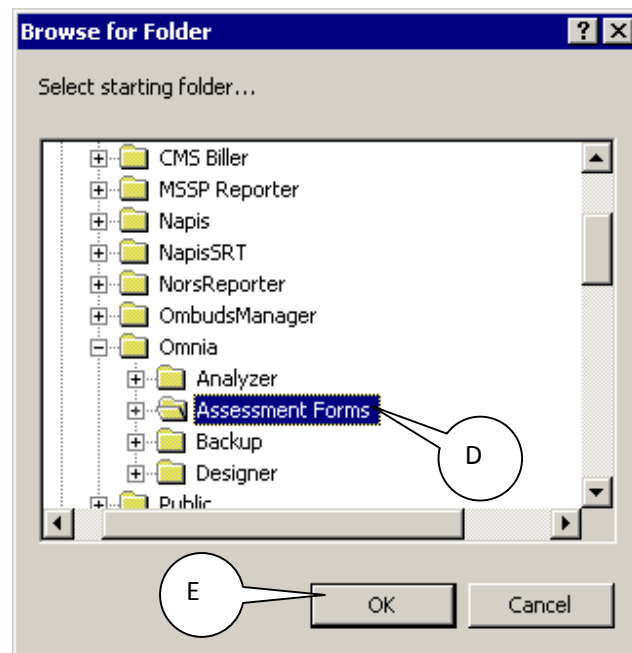
C) **Scroll** down and **Click** on the **+** symbol located to the left of the Omnia folder



D) **Highlight** the **Assessment Forms** folder.
E) **Click** the **OK** button.



## You will now be able to see "AAA Universal Intake 070110.afm". Continue with step number 7 on page 4.